

REQUEST FOR REFUND OR EXEMPTION
OF CITY OF MOUNTAIN VIEW REAL PROPERTY CONVEYANCE TAX
MOUNTAIN VIEW CITY CODE SECTION 29.62

City of Mountain View
Finance and Administrative Services Department
P.O. Box 7540
Mountain View, CA 94039-7540

REAL PROPERTY CONVEYANCE TAX

Grantor: _____

Relationship to Grantee: _____

Grantee: _____

Relationship to Grantor: _____

Property Address: _____

Assessor's Parcel Number: _____

The undersigned requests a refund of the real property conveyance tax paid to the County Recorder of Santa Clara County or requests an exemption from the real property conveyance tax for the reasons stated below:

☐ **REFUND OF REAL PROPERTY CONVEYANCE TAX PAID:**

The following document(s) was/were recorded with the County Recorder and the City's real property conveyance tax was paid.

- a. Type of Document Recorded (copy attached):

- b. Doc. No. _____ in Book _____ at Page No. _____
- c. Date of Recording: _____
- d. Amount of Tax Paid: \$ _____ (attach receipt)

-- OR --

☐ **EXEMPTION OF REAL PROPERTY CONVEYANCE TAX FOR PROPOSED TRANSFER:**

Document(s) not yet recorded with the County Recorder and no tax paid yet. Applicant wants prior determination of exemption.

BASIS FOR CLAIM OF REFUND OR EXEMPTION

- ☐ Transfer of property between immediate family members (grandparent; parent; child; spouse).
- ☐ Transfer of property pursuant to property settlement in dissolution of marriage pursuant to Revenue and Taxation Code Section 11927.
- ☐ Transfer of property for purpose of adding or deleting a cosigner with no financial consideration.
- ☐ Transfer of real property by deed, etc., conveying lands by inter vivos trust or by reason of death pursuant to Revenue and Taxation Code Section 11930.
- ☐ Partnership per Mountain View City Code Section 29.71.
- ☐ Transfer of property title to accommodate a change in office of the trustee. No change in ownership and no financial consideration.
- ☐ Other (29.66, 29.67, 29.68, 29.69, 29.70).

STATEMENT OF FACTS

I/We declare that I/we qualify for a refund or exemption of the City of Mountain View real property conveyance tax for the following reasons:

I declare under penalty of perjury that the foregoing information and statement of facts are true and correct and request a refund or exemption of the real property conveyance tax.

Executed this _____ day of _____, 20____, at _____, California.

(Printed Name of Claimant)

(Printed Name of Claimant)

(Signature of Claimant)

(Signature of Claimant)

(Title of Claimant)

(Title of Claimant)

CITY OF MOUNTAIN VIEW

☐ Approved

☐ Denied

By: _____
Finance and Administrative
Services Director

Dated: _____

Please include the following documents with this request:

- Copy of last recorded deed.
- Copy of any applicable sections of a trust document that establish the key facts.

Additional documentation may be requested, as necessary.